

January 2009

RE: EDExpress for Windows 2008-2009, Release 4.0

Dear EDExpress Users:

Federal Student Aid is pleased to announce the availability of EDExpress for Windows 2008-2009, Release 4.0. Release 4.0 is the most recent of three planned EDExpress 2008-2009 enhancement releases that implement provisions of the College Cost Reduction and Access Act (CCRAA), Pub. L. 110-84, and other regulatory changes. Release 4.0 also includes updates to data edits in the William D. Ford Federal Direct Loan (Direct Loan) module to enable the origination and disbursement of Direct Unsubsidized loans according to the annual loan limit increases authorized by the Ensuring Continued Access to Student Loans Act of 2008 (ECASLA), Pub. L. 110-227.

In addition to other changes, the CCRAA authorized the Teacher Education Assistance for College and Higher Education (TEACH) Grant Program for implementation beginning with the 2008-2009 award year. The TEACH Grant Program provides up to \$4,000 a year in grant assistance to a student who agrees to serve for at least four years as a full-time teacher in a high-need field in a public or private elementary or secondary school that serves students from low-income families. A TEACH Grant recipient who does not complete the required teaching within a specified timeframe, or fails to meet certain other requirements of the TEACH Grant Program, will be required to repay the TEACH Grant as a Direct Unsubsidized Loan under the Direct Loan Program.

For further operational guidance on the TEACH Grant Program, refer to the Electronic Announcement posted to Federal Student Aid's Information for Financial Aid Professionals (IFAP) Web site on June 19, 2008 at

ifap.ed.gov/eannouncements/061908AddtlTEACHGrantOpImp.html. For policy guidance on the TEACH Grant Program, refer to the Dear Colleague Letter 08-01, posted on the IFAP Web site at ifap.ed.gov/dpcletters/010808GENFP0801.html, and the TEACH Grant Final Rule, posted on the IFAP Web site at ifap.ed.gov/fregisters/FR06232008TEACH.html. Finally, for further guidance on Institutional Eligibility to participate in the TEACH Grant Program, please refer to Dear Colleague Letter GEN 08-07 posted on the IFAP Web site at ifap.ed.gov/dpcletters/060308GEN0807.html.

In late June 2008, we posted EDExpress 2008-2009, Release 3.0, which added the ability to create and update student TEACH Grant origination and disbursement records, export TEACH Grant origination and disbursement records for processing by the Common Origination and Disbursement (COD) System, and import responses and reports returned by the COD System for TEACH Grant records.

EDExpress 2008-2009, Release 4.0 enhances TEACH Grant functionality by adding multiple new reports based on TEACH Grant data in your EDExpress database and in reports sent by the COD System, including the School Account Statement (SAS) and Pending Disbursement reports.

Note: The COD System began producing the TEACH Grant reports added to Release 4.0 during the period of September 26-27, 2008. For more information, see the [September 3, 2008 electronic announcement](#) posted to the IFAP Web site at ifap.ed.gov/eannouncements/090308PreReleaseCCRAA.html.

In late March 2009, we will post EDEExpress 2008-2009, Release 5.0, which will add the ability to rebuild TEACH Grant records in EDEExpress using a file generated by the COD System.

About this Cover Letter

This letter includes the following information:

- An overview of TEACH Grant enhancements available in Release 4.0
- An important note regarding Direct Loan award limit edits in Release 4.0
- A list of additional enhancements to EDEExpress for CCRAA and other regulatory changes
- Information regarding the *2008-2009 COD Technical Reference*
- Microsoft Windows Vista compatibility information
- Reminders on backing up and optimizing your EDEExpress database

How to Get EDEExpress and Documentation

You can download Release 4.0 and related user documentation from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Instructions for downloading EDEExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the *2008-2009 Installation Guide for EDEExpress for Windows*.

Note: Some organizations restrict their employees from downloading programs from Internet sites. If you have trouble downloading, contact your technical support staff to ensure that you have full download rights.

If You Have Technical Support Questions

Contact CPS/SAIG Technical Support if you have questions regarding EDEExpress installation or functionality, have trouble accessing the FSAdownload Web site, or require other technical assistance.

You can reach CPS/SAIG Technical Support Monday through Friday, 8 a.m. – 8 p.m. (ET), at **800/330-5947 (TDD/TTY 800/511-5806)**. You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov. A representative will respond within one business day.

You can also post questions regarding EDEExpress on FSATECH. FSATECH is an electronic mailing list for technical questions about Federal Student Aid systems, software, and mainframe products. For more information on subscribing to FSATECH, go to ed.gov/offices/OSFAP/services/fsatechsubscribe.html.

If You Have Questions Regarding the COD System

If you have any questions about the COD System, contact the COD School Relations Center at **800/474-7268** for Grants or **800/848-0978** for Direct Loans. You may also e-mail CODSupport@acs-inc.com.

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EDEExpress 2008-2009, Release 4.0 Installation

Release 4.0 can be installed as an upgrade to Release 1.0, Release 2.0, or Release 3.0. You must have an earlier version installed to run an upgrade (or “custom”) installation of Release 4.0.

Reminder: Before upgrading to Release 4.0, ensure you have a reliable backup copy of your current EDEExpress 2008-2009 production database (**expres89.mdb**).

To upgrade to Release 4.0, select the Stand Alone Custom or Workstation Custom option during installation, depending on your EDEExpress operating environment.

If you have not previously installed EDEExpress 2008-2009, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 4.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation loads a new, blank 2008-2009 EDEExpress database to your system. If you already have a 2008-2009 database, a Stand Alone Full or a Network Server/Workstation Full installation of Release 4.0 will overwrite your database and all previously entered 2008-2009 data will be lost.

For more information on the EDEExpress installation process, see the *Installation Guide for EDEExpress for Windows 2008-2009*, which is available for download from the FSAdownload Web site at fsadownload.ed.gov/softexpress0809.htm.

Direct Loan Award Limit Edits in Release 4.0

The installation of EDEExpress 2008-2009, Release 4.0 will load an updated program file we originally posted to the FSAdownload Web site (fsadownload.ed.gov) in July 2008 as an optional enhancement for Release 3.0. This program file change enables Direct Loan module users to originate and disburse Direct Unsubsidized Loan according to the annual loan limit increases authorized by the ECASLA. The ECASLA loan limit increases are effective for loans first disbursed on or after July 1, 2008.

As noted in the July 17, 2008 electronic announcement posted to the IFAP Web site at ifap.ed.gov/eannouncements/081708ECASLALoanLimits.html, Federal Student Aid originally advised schools to originate additional loans in EDEExpress 2008-2009 to cover the increased loan eligibility provided by the ECASLA, but received subsequent feedback from EDEExpress Direct Loan users indicating that creating additional loan records was not a viable workaround. As a result, we developed and posted the program file, which relaxed the software’s loan limit edits, as an interim solution for users, and we have now incorporated the program file’s functionality into Release 4.0.

Note: Direct Loan schools that install Release 4.0 should be aware that this version removes **all** software edits pertaining to Direct Loan subsidized and unsubsidized annual loan limits from the origination process. After installing Release 4.0, you should plan to more closely monitor and verify loan award amounts for individual students and ensure they do not exceed annual loan limits based on your students' eligibility.

Policy guidance on ECASLA loan limits can be found in Dear Colleague Letter GEN-08-08, posted on the IFAP Web site at ifap.ed.gov/dpcletters/061908GEN0808.html, and Direct Loan Bulletin DLB-08-16, posted on the IFAP Web site at ifap.ed.gov/dlbulletins/062708DLB0816.html.

Note: EDEExpress 2009-2010, Release 2.0, scheduled for release in late March 2009, will restore loan limit edits to the EDEExpress origination process for the 2009-2010 award cycle.

New TEACH Grant Functionality in Release 4.0

EDEExpress 2008-2009, Release 4.0 adds the following enhancements related to TEACH Grant functionality:

TEACH Grant Imports

The following reports, sent by the COD System for the TEACH Grant program, can now be imported and printed from EDEExpress (from **File, Import, TEACH**):

- **Pending Disbursement Report** – The COD System generates and sends the TEACH Grant Pending Disbursement report on a weekly basis under the THPD09OP message class. The report lists TEACH Grant records for your school that have pending anticipated disbursements (Disbursement Release Indicator = False).
- **Multiple Reporting Record (Concurrent Enrollment)** – The COD System generates Concurrent Enrollment Multiple Reporting Record files automatically under the THMR09OP message class when the same student is reported as attending different TEACH Grant-awarding schools within a similar period of enrollment. The report provides you with information about the student's TEACH Grant origination and disbursement status at other schools and the amount of TEACH Grant award(s) disbursed.
- **SSN/Name/Date of Birth Change Report** – The SSN/Name/Date of Birth Change report, sent by the COD System under the THSNPFOP message class, lists students who have had identifier changes (including changes to SSN, name, and date of birth) during the reporting period, which is 90 days prior to the report end date. A student with an identifier change will be included on your school's report if that person was associated with your school for any of the three most recent award years. The change may have been initiated by your school, another school associated with the student, or Direct Loan Servicing (in the case of an SSN change only). The report detail provides information on the school submitting the change, the field changed, the old value, the new value, and the date the change was accepted, to assist your school with researching any related identifier issues.

- **Inactive TEACH Grant Report** – The Inactive TEACH Grant Report, sent by the COD System under the THIGPFOP message class, lists all TEACH Grant awards that have been inactivated (the award and any anticipated or actual disbursements have been adjusted to \$0) by the school for the reporting period. Schools can reconcile this report with internal school records to verify that all awards needing to be made inactive have been processed by the COD System.
- **School Account Statement** – The COD System generates and sends TEACH Grant School Account Statement (SAS) files on a monthly basis. The SAS report contains TEACH Grant cash summary, cash detail, award detail, and disbursement activity level information for the reported period. Release 4.0 enables you to import and print SAS reports sent under the THSM09OP (monthly) or THSY09OP (year-to date) message class.

Note: Use the COD Web site (cod.ed.gov) to update the version of the TEACH Grant SAS your school wishes to receive to the monthly, year-to-date, or both monthly and year-to-date version. If you do not modify your settings on the COD Web site, you will receive the monthly version.

Note: For more information on TEACH Grant reports generated by the COD System, see Volume VI, Section 8 (COD Reports) of the *2008-2009 COD Technical Reference*, which is available for download from the FSAdownload Web site (fsadownload.ed.gov).

TEACH Grant Reports

The following TEACH Grant reports can now be printed from **File, Print, TEACH:**

- **Edits by Student – Origination** – The Edits by Student-Origination report lists processing edits applied to single or multiple TEACH Grant origination records by the COD System.
- **Edits by Student – Disbursement** – The Edits by Student-Disbursement report lists processing edits applied to single or multiple TEACH Grant disbursement records by the COD System.
- **List – Status** – The List-Status report provides a list of anticipated and actual disbursement data and statistics for booked and unbooked TEACH Grant records in your EDEExpress database, as well as relevant status codes and activity dates for each disbursement record.
- **List – Disbursement Activity Summary** – The List-Disbursement Activity Summary report lists TEACH Grant records for which total actual disbursement amounts are less than the award amount on the origination record.
- **List – Processed Disbursements Year-to-Date** – The List-Processed Disbursements Year-to-Date report lists the total of all TEACH Grant disbursement records accepted by the COD System for each TEACH Grant origination record in EDEExpress.

- **SSN Differences Report** – The SSN Differences report lists all students with TEACH Grant records in your EDEExpress database whose original SSNs are different than their current SSNs.
- **Student Summary** – We enhanced the existing Student Summary report, which can be printed from any EDEExpress print menu inside or outside student records, to include origination and disbursement information for student TEACH Grant records in EDEExpress.

Note: For more information and guidance regarding TEACH Grant functionality in EDEExpress 2008-2009, see the help topic “Teacher Education Assistance for College and Higher Education Grant (TEACH Grant)” in EDEExpress online help. You can access online help from the EDEExpress main menu by selecting **Help, Help Topics**.

2008-2009 COD Technical Reference

The *2008-2009 COD Technical Reference* provides technical specifications and record layouts for transmitting Pell Grant, ACG, National SMART Grant, TEACH Grant, and Direct Loan data to the COD System.

You can download the technical reference from the FSAdownload Web site (fsadownload.ed.gov).

Microsoft Windows Vista Test Results

We tested Microsoft Windows Vista as an operating system for our EDESuite PC products earlier this year. EDEExpress 2008-2009, Release 4.0 includes modifications that will allow you to install and run it on Vista workstations.

For more information on our Vista testing results and the issues we discovered, see the [September 18, 2008 electronic announcement](#) posted to the IFAP Web site (ifap.ed.gov).

Reminders

Back Up Your Database Regularly

You should back up your EDEExpress database file (**expres89.mdb**) regularly so you do not lose your data. We recommend that you back up your files after each major update to your database (for example, after updating a large group of student records), or at least once a week. You should also back up your data before and after you run the software utilities as a precautionary measure.

EDEExpress does not include a backup utility. You must use your own backup system. Be sure to test your backup system regularly to verify that you can reliably restore your database.

Optimize Your Database with Software Utilities

EDEExpress contains utilities enabling you to optimize your database to prevent problems. We recommend that you run the Compact and Repair Database and Verify Database utilities at least once a week. Be sure to create a backup of your database before and after running these utilities.

Run the software utilities in the following order:

- Compact and Repair Database
- Verify Database
- Compact and Repair Database

Run the Compact and Repair Database Utility

The Compact and Repair Database utility resolves inconsistencies in record storage and improves the performance of the EDEExpress database. Running this utility at least once a week helps to prevent database problems.

Events such as a power outage or a local area network (LAN) failure can corrupt your database if it occurs while users are logged into EDEExpress. If your system functions unpredictably (for example, you start getting database error messages), run the Compact and Repair Database utility.

Running the Compact and Repair Database utility on a regular basis can make your database significantly smaller and improve EDEExpress' performance. The utility reduces the size of your database by organizing and storing records more efficiently and removes records flagged for deletion.

Warning: Before using the Compact and Repair Database utility, be sure you have space on your hard drive or LAN folder that is at least three times the current size of your EDEExpress database. You should also ensure all other users are logged out of EDEExpress before running the Compact and Repair Database utility.

Run the Verify Database Utility

Each student record in EDEExpress has multiple parts that are stored in different database tables. The Verify Database utility checks the integrity of relationships between these tables. If EDEExpress shuts down due to a program error or halts abnormally while you are processing data, links between various parts of a record may become damaged. Verify Database repairs these damaged links within the database.

You should run the Compact and Repair Database utility before and after running the Verify Database utility. Running this utility at least once a week is recommended as part of your preventative maintenance routine.

Warning: Before using the Verify Database utility, ensure you have hard drive or LAN folder space available equal to at least three times the current size of your EDEExpress database. You should also ensure all other users are logged out of EDEExpress before running the Verify Database utility.